



**Update\_2\_0\_76**

## **Clinical Reminders**

**VA-Comprehensive Primary Care template**

## **Install Guide**

**July 2019**

Product Development  
Office of Information Technology  
Department of Veterans Affairs

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# Introduction

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Section 201 of the Veterans Access, Choice, and Accountability Act (VACAA) mandated a comprehensive examination of Veteran Affairs' (VA) ability to deliver accessible, high-quality health care to Veterans. Under the direction and support of VA's Office of Community Care (OCC), a Revenue Transformation (RT) Plan was developed to strategically implement new or enhance existing industry best practices that would eliminate inefficiencies in VA's business processes specific to the revenue cycle, ultimately improving a Veteran's access to high quality care.

To address the findings within the Section 201 report related to clinical documentation, an integrated project team was formed with the goal of improving the accuracy and timeliness of clinical documentation through streamlined processes and innovative solutions. This team developed and validated a sample comprehensive patient and revenue centric template for foundational service (primary care). The development of the Primary Care template aimed to address the Section 201 Assessment's recommendation regarding the standardization of clinical and administrative data for accuracy and interoperability.

The benefits expected to be realized through the adoption and use of the Primary Care template are 1) improved comprehensive and standardization of clinical documentation, 2) enhanced overall patient care, 3) increased workflow efficiency, and 4) optimized revenue capture. It is understood that when the new EHR system (Cerner) is fully implemented, it will include functionalities for standardizing clinical documentation, however pending the Cerner implementation, the use of the Primary Care template is strongly encouraged across the Veterans Health Administration (VHA). Templates used within each clinical setting play a significant role in the successful use and interoperability of information pertinent to the quality of Veteran care and optimization of VA revenue.

## **UPDATE\_2\_0\_76 contains 1 Reminder Exchange entry:**

UPDATE\_2\_0\_76 Comprehensive PC Template

## **The exchange file contains the following components:**

### **TIU TEMPLATE FIELD**

WORD PROCESSING 60/6  
WORD5  
BLANK SPACE1  
ROS-HYMP/LYMP  
ROS-ENDOCRINE  
EDIT 70  
ROS-NEURO/PSYCH  
ROS-MUSCULOSKELETAL  
ROS-GENITAL/URINARY  
ROS-GASTROINTESTINAL  
ROS-CARDIOVASCULAR  
ROS-LUNGS  
ROS-HEENT  
ROS-SKIN

ROS-GENERAL  
YES/NO REQ  
ROS - SEXUAL HISTORY DISEASES  
ROS - SEXUAL HISTORY  
WORD PROCESSING - 2 LINES  
WORD PROCESSING - 6 LINES

#### **HEALTH FACTORS**

VA-REMINDER UPDATES  
VA-UPDATE\_2\_0\_76  
CDI  
CDI PRIMARY CARE

#### **REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_76  
VAL-BL PREVNAR13 REMINDER DUE

#### **REMINDER DIALOG**

VA-CDI PRIMARY CARE TEMPLATE

#### **HEALTH SUMMARY TYPE**

VITALS TODAY

#### **HEALTH SUMMARY OBJECTS**

VITALS TODAY (TIU)

#### **TIU DOCUMENT DEFINITION**

VITALS TODAY

#### **Install Details**

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This update is being distributed as a web host file. The address for the host file is:

**[http://vista.med.va.gov/reminders/UPDATE\\_2\\_0\\_76.PRD](http://vista.med.va.gov/reminders/UPDATE_2_0_76.PRD)**

The file will be installed using Reminder Exchange, programmer access is not required.

Installation:

=====

This update can be loaded with users on the system. Installation will take less than 30 minutes.

#### **Install Example**

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To Load the Web Host File. Navigate to Reminder exchange in Vista

```

+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CFE  Create Exchange File Entry      LHF  Load Host File
CHF  Create Host File                 LMM  Load MailMan Message
CMM  Create MailMan Message           LR   List Reminder Definitions
DFE  Delete Exchange File Entry       LWH  Load Web Host File
IFE  Install Exchange File Entry      RI   Reminder Definition Inquiry
IH   Installation History              RP   Repack
Select Action: Next Screen// LWH    Load Web Host File
Input the URL for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_76.PRD

```

At the **Select Action:** prompt, enter **LWH** for Load Web Host File

At the **Input the url for the .prd file:** prompt, type the following web address:

**http://vista.med.va.gov/reminders/UPDATE\_2\_0\_76.PRD**

```

http://vista.med.va.gov/reminders/UPDATE_2_0_76.PRD successfully loaded.

```

You should see a message at the top of your screen that the file successfully loaded.

Search and locate an entry titled **UPDATE\_2\_0\_76 COMPREHENSIVE PC TEMPLATE** in reminder exchange

+Item	Entry	Source	Date Packed
179	UPDATE_2_0_76 COMPREHENSIVE PC TEMPLATE	← GRIFFITH@SALT LAKE CI	07/17/2019@05:12
180	UPDATE_2_0_77 VA-OSP CSRE UPDATE	GRIFFITH@SALT LAKE CI	08/19/2019@14:03
181	UPDATE_2_0_78 MISC UPDATE 8	MONTGOMERY@SALT LAKE CI	05/30/2019@09:27
182	UPDATE_2_0_79 VA-ACUTE STROKE TEMPLATES	GRIFFITH@SALT LAKE CI	08/01/2019@07:44
183	UPDATE_2_0_8 MH UPDATES	MONTGOMERY@SALT LAKE CI	02/24/2017@12:44
184	UPDATE_2_0_80 VA-TH VVC REMINDERS	GRIFFITH@SALT LAKE CI	05/15/2019@05:36

```

+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CFE  Create Exchange File Entry      LHF  Load Host File
CHF  Create Host File                 LMM  Load MailMan Message
CMM  Create MailMan Message           LR   List Reminder Definitions
DFE  Delete Exchange File Entry       LWH  Load Web Host File
IFE  Install Exchange File Entry      RI   Reminder Definition Inquiry
IH   Installation History              RP   Repack
Select Action: Next Screen// IFE    Install Exchange File Entry
Enter a list or range of numbers (1-305): 179

```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry

Enter the number that corresponds with your entry titled **UPDATE\_2\_0\_76**

**COMPREHENSIVE PC TEMPLATE** (in this example it is entry 179, it will vary by site)

Component	Category	Exists
Source: GRIFFITH,ELIZABETH A at SALT LAKE CITY		
Date Packed: 07/17/2019@05:12:50		
Package Version: 2.0P35		
Description:		
The following Clinical Reminder items were selected for packing:		
REMINDER DIALOG		
VA-CDI PRIMARY CARE TEMPLATE		
REMINDER TERM		
VA-REMINDER UPDATE_2_0_76		
VAL-BL PREVNR13 REMINDER DUE		
Non-exchangeable TIU object(s):		
-----		
TIU Object: PATIENT AGE		
Object Method: S X=\$\$AGE^TIULO(DFN)		
+ Enter ?? for more actions >>>		
IA	Install all Components	IS Install Selected Component
Select Action: Next Screen// IA		

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.

Select Action: Next Screen// **IA Install all Components**

During the installation, you will see several prompts: \*Note that you will **Install** all new components\*, you will **SKIP** any components that already exists but the packed component is different and you are prompted for a response.

### You will be prompted to install the new dialog component:

Packed reminder dialog: VA-CDI PRIMARY CARE TEMPLATE [NATIONAL DIALOG]				
Item	Seq.	Dialog Findings	Type	Exists
1		VA-CDI PRIMARY CARE TEMPLATE	dialog	
2	5	VA-CDI PRIMARY CARE NOTE VERSION Finding: *NONE*	element	
3	10	VA-GP CDI PRIMARY CARE MAIN MENU Finding: *NONE*	group	
4	10.5	VAL-GP CDI PRIMARY CARE MAIN Finding: *NONE*	group	
5	10.5.5	VA-CDI PC PT INFO Finding: *NONE*	element	
6	10.5.10	VA-CDI PC CHIEF COMPLAINT Finding: *NONE*	element	
7	10.5.15	VAL-CDI PC HPI Finding: *NONE*	element	
+ + Next Screen - Prev Screen ?? More Actions				
DD	Dialog	Details	DT Dialog Text	IS Install Selected
DF	Dialog	Findings	DU Dialog Usage	QU Quit
DS	Dialog	Summary	IA Install All	
Select Action: Next Screen// IA				

At the **Select Action** prompt, type **IA** to install the dialog – **VA-CDI PRIMARY CARE TEMPLATE**

Select Action: Next Screen// **IA Install All**

Install reminder dialog and all components with no further changes: **Y// ES**



## Post Installation

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### 1. Make the Dialog templates available to be attached to a Personal or Shared template or to be able to attach the dialog to a progress note title.

From the Reminders Manager Menu:

Select Reminder Managers Menu Option: **CP CPRS Reminder Configuration**

CA Add/Edit Reminder Categories  
CL CPRS Lookup Categories  
CS CPRS Cover Sheet Reminder List  
MH Mental Health Dialogs Active  
PN Progress Note Headers  
RA Reminder GUI Resolution Active  
**TIU TIU Template Reminder Dialog Parameter**  
DL Default Outside Location  
PT Position Reminder Text at Cursor

Select CPRS Reminder Configuration Option: **TIU TIU Template Reminder Dialog Parameter**

Reminder Dialogs allowed as Templates may be set for the following:

1 User       USR [choose from NEW PERSON]  
3 Service    SRV [choose from SERVICE/SECTION]  
4 Division   DIV [choose from INSTITUTION]  
5 System     SYS [NATREM.FO-SLC.MED.VA.GOV]

Enter selection: **5** *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level*

Setting Reminder Dialogs allowed as Templates for System:

Select Display Sequence: **?**

148       VA-VETERANS CHOICE NOTE  
149       VA-TBI SCREENING  
151       VACO TRANSPLANT REFERRAL (D)

*When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number **NOT** on this list. For this example, looking above I see the number 150 is not present, so I will use 150.*

Select Display Sequence: **150**

Are you adding 150 as a new Display Sequence? Yes// **Y YES**

Display Sequence: 150// **<Enter>**

Clinical Reminder Dialog: **VA-CDI PRIMARY CARE TEMPLATE** **<Enter>**

OK? Yes// **<Enter>** (Yes)



## 2. Setup of Note title

This template can be used as a stand alone template or associated with an existing note title at a site, your site can determine how they would like to use it.

To use as note title create following.

Note Title: **PRIMARY CARE CDI TEMPLATE**

The VHA Enterprise Standard Title will be: **PRIMARY CARE NOTE**

## 3. Associate the reminder dialog with the note title in CPRS.

Use the template editor to associate the new template with either a shared template or document title

To associate the dialog with the note title in CPRS.

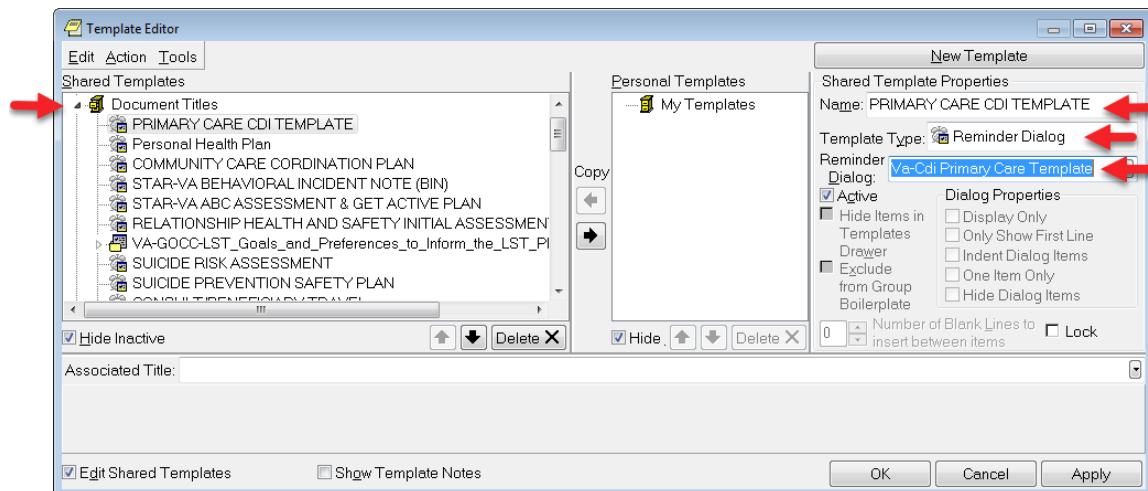
Go to Template Editor, then Document Titles, select the appropriate folder (if applicable), and choose New Template (top right-hand corner).

Type in the following information:

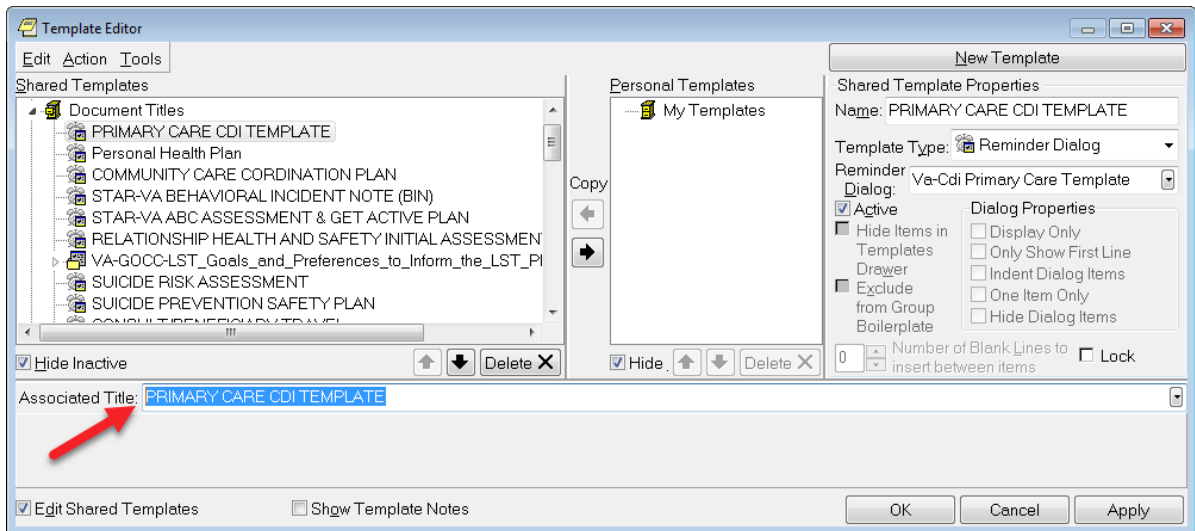
Name: PRIMARY CARE CDI TEMPLATE

Template Type: **Reminder Dialog**

Reminder Dialog: **VA-CDI PRIMARY CARE TEMPLATE**



Next, type in the Associated Title, which in this case is: PRIMARY CARE CDI TEMPLATE  
Hit Apply and OK



#### 4. Add your local quick orders as finding items to the following elements:

*All of these elements are local so you can change the dialog text to match the services your facility provides if they do not match. You may also disable an element if your facility doesn't offer one of these services.*

Using the menu Reminder Dialog Management, Reminder Dialogs, change your view to Elements. Search for and edit the following element. VAL-CDI IMAGING ORDERS MENU. Add your local quick order or menu for ordering imaging exams to this element as finding.

#### 5. Return to Clinic OPTIONS

**Option 1: Return to clinic order:** Using the menu Reminder Dialog Management, Reminder Dialogs, change your view to Group. Search for and edit the following group. VAL-GP CDI RTC MAIN. Add your local quick order or menu for ordering RTC orders to this element as finding. **Skip option 2 (next step) if adding RTC to finding.**

**Option 2: Return to clinic dialog components: Add your local return to clinic (RTC) group/element to the following group:**

If you have specific reminder dialogs elements and groups already built for return to clinic, you can replace this group with your local option. This is optional. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Group view and search for group VAL-GP CDI FOLLOW UP APPT MAIN. In sequence replace group VAL-GP CDI RTC MAIN with your local return to clinic group/element. Alternative your site RTC are not held in group or element add your local RTC quick order to findings.

#### 6. Insert your local data objects:

- a. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Group view and search for group VAL-GP CDI PC MEDS. Edit the dialog text and add your local TIU Data Object for active medications.

- b. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for element VAL-CDI PROBLEMS LIST OBJECT. Edit the dialog text and add your local TIU Data Object for problem list.
- c. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for element VAL-CDI PC VITALS (BMI). Edit the dialog text and add your local TIU Data Object for BMI.
- d. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for element VAL-CDI PC IMAGING. Edit the dialog text and add your local TIU Data Object for imaging.
- e. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for element listed below. Edit the dialog text and add your local TIU Data Object for appropriate labs.
  - i. VAL-CDI PC LABS METABOLIC PANEL
  - ii. VAL-CDI PC LABS A1C
  - iii. VAL-CDI PC LABS LIPID
  - iv. VAL-CDI PC LABS CBC
  - v. VAL-CDI PC LABS URINALYSIS
- f. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for element VAL-CDI PC EKG. Edit the dialog text and add your local TIU Data Object for EKG.

## **7. Social History section**

- a. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Group view and search for group VAL-GP CDI PC F/UP SOCIAL HX TOBACCO. Edit the dialog text and add your local element/group for tobacco screening.
- b. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Group view and search for group VAL-GP CDI PC F/UP SOCIAL HX ALCOHOL. Edit the dialog text and add your local element/group for alcohol screening.

## **8. Immunization section**

Facilities must decide on which method to follow.

Option 1: Do not want immunizations to appear on reminder dialog, prefer to have providers select immunizations from reminder drawer only. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Group view and search for group VAL-GP CDI PC MEDS. Disable group: VAL-GP CDI PC IMMUNIZATION

Option 2: Want immunization dialog to appear on note. Same dialog as reminder will appear. Will use national reminder dialog VA-PNEUMOCOCCAL IMMUNIZATION PCV13 PREVNAR as an example.

Step 1: The main groups and elements from the reminder dialog VA-PNEUMOCOCCAL IMMUNIZATION PCV13 PREVNAR can be added to the Immunization section. Add the groups/elements from the VA-PNEUMOCOCCAL IMMUNIZATION PCV13 PREVNAR dialog to the group VAL-GP CDI PC PREVNAR13 MAIN in the same sequence as shown below.

- 5 VA-TEXT PREVNAR13 HEADER
- 10 VA-GP TEXT PNEUMOC PCV13 WARNING
- 12 VA-TEXT BLANK LINE WITH TEMPLATE FIELD
- 19 VA-TEXT PNEUMOC PCV13 SYSTEMIC CHEMO MESSAGE
- 21 VA-TEXT PNEUMOC IMMUNOSUPP RX MESSAGE PARENT
- 29 VA-TEXT BLANK LINE SHORT
- 30 VA-GP IM PNEUMOC PCV13 PREVNAR ACTIONS
- 88 VA-TEXT BLANK LINE SHORT
- 89 VA-TEXT BLANK LINE WITH TEMPLATE FIELD
- 90 VA-GP TEXT PNEUMOC PCV13 INDICATIONS PARENT
- 100 VA-TEXT BLANK LINE WITH TEMPLATE FIELD
- 101 VA-TEXT BLANK LINE WITH TEMPLATE FIELD
- 102 VA-TEXT BLANK LINE WITH TEMPLATE FIELD

Option 3: Immunization option only appears if reminder status is DUE. Will use national reminder dialog VA-PNEUMOCOCCAL IMMUNIZATION PCV13 PREVNAR as example.

**Step 1:** Complete Option 2, Step 1. (above)

**Step 2:** Using the Vista menu, Reminder Managers Menu, Reminder Term Management, Add/Edit Reminder Term. Follow steps below.

Select Reminder Term: VAL-BL PREVNAR13 REMINDER DUE LOCAL  
...OK? Yes// (Yes)

Select Finding: CF.VA-REMINDER DEFINITION  
Are you adding 'VA-REMINDER DEFINITION' as a new FINDINGS? No// Yes

COMPUTED FINDING PARAMETER: VA-PNEUMOCOCCAL  
IMMUNIZATION PCV13

CONDITION: I V("STATUS")="DUE NOW"

**Step 3:** In group VAL-GP CDI PC PREVNAR13 MAIN enter the following:

REMINDER TERM: **VAL-BL PREVNAR13 REMINDER DUE**

REMINDER TERM STATUS: **FALSE**

REPLACEMENT ELEMENT/GROUP: <LEAVE BLANK>

Reminder Term VAL-BL PREVNAR13 REMINDER DUE was installed with this update. To duplicate for different immunization you will need to create new term with computer finding VA-REMINDER DEFINITION and complete fields below.

COMPUTED FINDING PARAMETER: <<< ENTER REMINDER DIFINITION >>

CONDITION: I V("STATUS")="DUE NOW"

9. The checkbox options under physical exam are editable, you can remove and/or add options to the selectable checkboxes in the prompts.
  - a. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to ADDITIONAL PROMPT view and search for and edit the prompt. You can add additional sequences or remove items from the existing sequences if needed, below is the list of the sections in the physical exam section and the prompt names for each section:
    - MOOD - CKBOX VA PC F/UP MOOD
    - HEENT - CKBOX VA PC F/UP PE HEENT
    - ORAL CAVITY - CKBOX VA PC F/UP ORAL CAVITY
    - NASAL CAVITY - CKBOX VA PC F/UP NASAL CAVITY
    - NECK - CKBOX VA PC F/UP NECK
    - HEART - CKBOX VA PC F/UP HEART
    - LUNGS - CKBOX VA PC F/UP LUNG
    - ABDOMEN - CKBOX VA PC F/UP ABDOMEN
    - EXTREMETIES - CKBOX VA PC F/UP EXTREMITIES
    - NEUROLOGIC - CKBOX VA PC F/UP NEUROLOGIC
    - SKIN - CKBOX VA PC F/UP SKIN

*NOTE: If you require further technical assistance, if there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket or contact the VA Service Desk and have them submit a national ticket to:*

*Category: Enterprise Applications*

*Enterprise Application: VistA - Clinical Reminders*

*Assignment Group: NTL SUP Clin 2*